

Sage Intacct 2022 Release 4 Highlights



Jelina Petzinger
Certified Sage Consultant



Troy Guevara
Construction Technologist

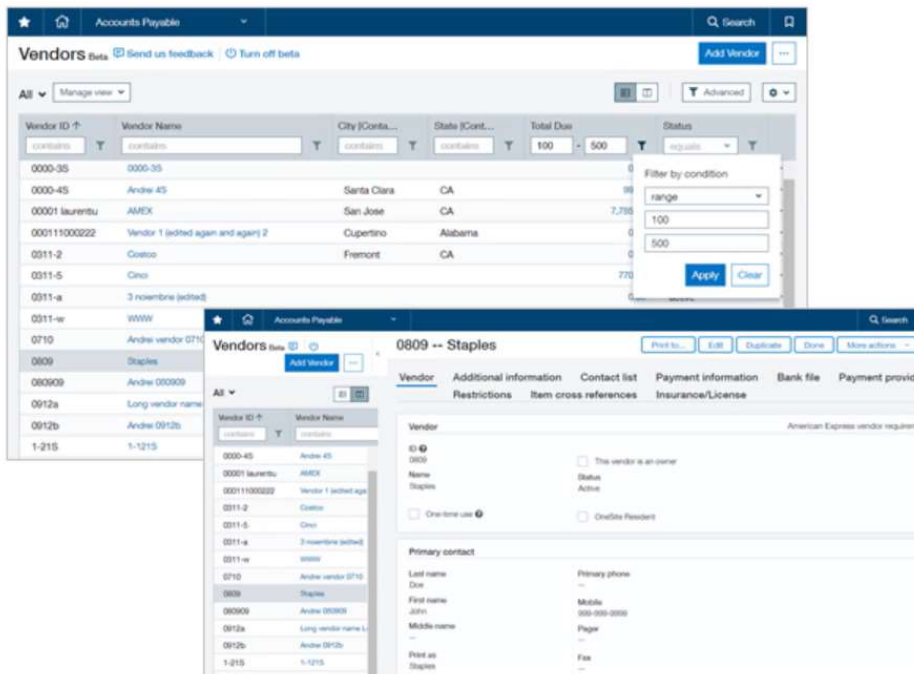


Release 4 Highlights

- Finding Release Notes Information & Demo Videos
- Sage Intacct Payroll powered by ADP & Early Adopter Construction Payroll
- 1099 e-filing powered by TaxBandits – Limited Release
- Sage Estimating Integration with Sage Intacct Construction
- Compliance Documentation
- Inventory: Fulfillment for sales orders and the ability to commit quantities to projects
- Reports: Audit History Reports [Platform Services>Custom Packages>Package Library]
- Additional embedded Training [Announcements & Video Library]
- List Enhancements

List enhancements

Increased personalization, efficiency, and usability



- Advanced filtering
- Reorder, resize, freeze columns with drag and drop interactions
- Out of the box list views
- Fewer steps / clicks
- Responsive page layouts

Vendors Beta [Send us feedback](#) [Turn off beta](#)

Add Vendor

All* Manage view Revert changes

Advanced 3

Vendor ID	Vendor Name	Address LI...	City (Conta...	State (Cont...	Paymen... ↑	Postal Cod...	Country (C...	Total Due	Status	
00001 laurentiu	AMEX	555 Tesla Way	San Jose	CA	high	94538	United States	7,785.00	active	0.5% 10, Net 30 Da
Shone	Target	99 Main St	Cupertino	CA	high	94333	United States	6,929.92	active	
0000-2S	ABCDEF GHI Consulting Services Inc	123 Main St	San Jose	CA	high	95445	United States	0.00	active	
0311-2	Costco	222 Summer St	Fremont	CA	normal	94599	United States	0.00	active	
0809	Staples	999 Main ST	Santa Clara	CA	normal		United States	1,400.00	active	
0311-5	Cinci			CA	normal		United States	770.00	active	
112233	Andrei Vendor	Address 1	Ciyt	CA	normal	56535	United States	6,120.00	active	
0912a	Long vendor name Long vendor name Long vendor name		Cupertino	CA	normal		United States	0.00	active	
0000-1S	Andrei5	Address 1	City	CA	normal	13454	United States	350.00	active	Andrei Term 5 days
SPEC-01	SPECIAL OCCASIONS			CA	normal		United States	300.00	active	Net 30
COS001	COSTON APPRAISAL & RESEARCH			CA	normal		United States	999.00	active	Net 30
Jill2	Jill2		San Jose	CA	normal		United States	0.00	active	
0000-4S	Andrei 4S	13 Apollo Way	Santa Clara	CA	urgent	94536	United States	799.00	active	Andrei 20 Day Term
SANDRA WELLS	SANDRA WELLS CO			CA	urgent		United States	999.99	active	Net 30
NAVEEN	Naveen		San Jose	CA	urgent		United States	0.00	active	Net 30

Construction Roadmap Update

Construction Billing

- Enhanced Financial Dashboard Capability with GL Budget Integration
- New Form Designer for Enhanced Document Publishing
- Project Contract Billing 360 – Full Visibility into the contract

Post project contract to GL budget

The screenshot displays the 'Project contract' form in Sage Intacct. The form includes fields for 'Customer' (011 - Berkeley Technology Inc) and 'Architect'. A 'Summary' section shows financial details: Original price (18.21), Revised price (206.00), Approved change price (0.00), Total revised contract price (218.21), Pending change price (0.00), Other price (80,000.00), and Forecast price (8,000.00). The 'Integrate with GL' section is highlighted with a green border and contains the following options:

- Post to GL budgets
- Original GL budget: Budget 1
- Revised GL budget ID: Budget 1
- Approved change GL budget ID: Budget 1
- Pending change GL budget ID: Budget 1
- Forecast GL budget ID: Budget 2
- Other GL budget ID: Budget 2

Under 'Posting period', the following options are available:

- Period of project begin date
- Period of project contract date
- Period of each project contract line date
- Period of each project contract line entry effective date

Subcontractor Compliance

- Lien Waiver Tracking
- Subcontract Insurance Tracking
- Miscellaneous Compliance Item Tracking
- Pay when Paid
- API integration for all compliance objects

Cost Forecasting

- Forecasting at the Cost Code or Cost Type Level
- Ability to Monitor Historical Monthly forecasts
- Ability to Review Change Management Objects
- Finalize and Publish Cost Forecasts for Financial Review

WIP Management

- Job Level Review with Drill into Cost Code Detail
- Capture Independent Financial Forecasts including Cost at Completion, Revised Contract Values, Estimated Gross Margin and Margin %
- Monthly Forecasts Preserved for trending
- Automatic generation of Over/Under Billing Transactions in GL

Reporting

- Additional Reporting Objects being released
- Additional Standard Reports – 9 New Reports as of yesterday [AP Retainage Bal; Estimate Spreadsheet; Open Invoices by Project with Drilldown; Estimate vs Cost and WIP as of a Specific Date]
- Ability to customize standard reports
- Routing & Docusign (2024)

Thank you! Questions?



consulting@digitekolutions.com



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* Recording will be available to you in 2 hours.